

Planning Coordination
Section

Edmonton

**Public Engagement
Charter**

1. Introduction

On April 11th, 2017, Edmonton City Council approved the new Public Engagement Policy C593. The Engagement Policy and Framework emphasise a decision-based approach to public engagement. This work sets the groundwork for the Planning Coordination Public Engagement Charter. The Charter clarifies public engagement in the land development application process.

a. What is this Public Engagement Charter about?

Public Engagement (PE) Charters are a tool from the PE Policy that lay out the role of engagement in an area of work. A PE Charter answers the questions:

- Why and when is public engagement needed?
- What is our shared commitment to engage and desired influence of the public?
- What is the context for engagement and how can it support public engagement planning?

b. What is Planning Coordination's work?

The Planning Coordination (PC) Section helps to create a vibrant and livable city. The team's outcomes consider public and private interests in land development applications. The planners and engineers in Planning Coordination do this by giving City Council a range of information, including a recommendation, which lets Council make well-informed land-use decisions. These decisions support land development proposals that meet City visions, plans and policies.

Most of Planning Coordination's work is to review and process planning land development applications. Staff apply their expertise and professional judgement in resolving issues and conflicts where:

- City policies appear to be at odds;
- Interests vary between parties involved/affected by applications; and
- Where viewpoints, preferences and/or priorities are different.

Planning Coordination staff might negotiate with applicants. They do this to change things in ways that, in their opinion, will improve applications. These negotiations influence Planning Coordination's recommendation of support or non-support. Staff work with other organisations and City groups to figure out technical concerns. This all goes into Planning Coordination's report to Council, as part of a Public Hearing. Report recommendations use professional rationale and consider policy and statutory plans. As well, staff look at public input, local knowledge and different perspectives. These views are also in Planning Coordination's report for Council.

c. How did Planning Coordination create this Public Engagement Charter?

A project team with staff from Planning Coordination and Public Engagement were the drivers of the process. They first met to scope out the groundwork in 2017. In mid-2017, the team hosted two internal workshops. Thirty-five staff from across the Urban Planning and Economy Department attended.

In the fall of 2017, 22 people were interviewed, including:

- residents both affiliated and not affiliated with the Community League system;
- residents who have and have not participated in Planning Coordination engagement;
- property owners;
- developers;
- industry consultants; and
- internal staff (Branch Managers, Directors, General Supervisors and a Program Manager).

The raw data collected was used to create a draft Public Engagement Charter. Next the team hosted a half-day workshop to review the draft. Fifteen applicant, public and Planning Coordination representatives met in late September 2018. In 2019, follow-up sessions to present and receive comments were held between Planning Coordination staff and the following individuals:

- representatives from the Edmonton Federation of Community Leagues;
- Infill Development in Edmonton Association;
- Urban Development Institute;
- City of Edmonton Indigenous Relations Office; and
- Planning Coordination Section staff.

With the onset of COVID 19 in 2020, there were delays with the rollout of the PE Charter. During this time there were major changes in public engagement, such as relying on online options. The Charter was updated to reflect the context of engagement.

The Public Engagement Charter was finalised after being reviewed by branch leadership.

d. How Will this PE Charter be Used?

The Public Engagement Charter will help Planning Coordination staff plan engagement for a Land Development Application (LDA). It also helps staff in communicating clear outcomes of engagement with everyone early. This Charter could also support applicants to decide if and how to engage before they apply for rezoning.

In the past Planning Coordination's public engagement (PE) focus has been:

- making sure affected members of the public are aware of proposals, and

- to share the public's views with Planning Coordination and Council.

Participant's expectations are often mixed. Some community members expect applicants to change their proposals based on feedback. Others expect City staff to ask for changes as a result of public input. These are not always met, for various reasons.

2. Public Engagement Charter Foundations

City of Edmonton Public Engagement Vision (from the City's PE Policy)

A City where we are connected, invested and proud to participate in shaping our community.

Planning Coordination Public Engagement Charter Mission

To provide Edmonton residents, members of City Council and City staff, and applicants clarity about how public engagement fits into the Planning Coordination land development application process.

Definitions

Decision Making - The process and actions undertaken by the applicant, Council and Planning Coordination in order to make informed decisions in their specific contexts.

Land development applications - An application by a landowner or designated representative to create or amend area plans such as Area Structure Plans, Neighbourhood Structure Plans, or Area Redevelopment Plans, to change the zoning of land (rezoning), and/or to close a portion of road right of way abutting one or more properties (road closure).

Planning Coordination - City of Edmonton section under the Development Services Branch that reviews and processes Land Development Applications.

Public - For the purpose of this Charter, the word public refers to all people in Edmonton, entitled to its rights and services and with a responsibility to take an active part in municipal decision making.

Interested Parties - An individual, organization or group that has an interest in an issue, will or may be affected, or has the ability to affect a decision or outcome. Organizations include government and non-government organizations, institutions and businesses.

Public Engagement - A process that creates opportunities for people to contribute to decision-making by City Council and Planning Coordination about the City's policies, programs, projects, and services and communicates how public input is collected and used.

*The City of Edmonton uses public engagement interchangeably with public consultation and public involvement.

3. Current Decision Making Process and Public Engagement

The City's Public Engagement Policy focuses on City decision-making.

The role of decision-makers – City Council or Planning Coordination (PC) – in public engagement is to:

- understand the public's views and perspectives on topics and issues
- consider public input in decision making, and
- communicate to the public how they used input and why they made decisions.

Public engagement is one factor in decision-making. It will have more or less influence relative to other factors for any specific decision. Other factors include policies, finances and technical details.

Public engagement offers the opportunity for City Council to:

- improve its role to represent community through understanding its interests, values and perspectives,
- work with PC to figure out how public input can make a difference to Council decisions,
- promote and direct the public to public engagement activities,
- consider public input as part of the decision-making process,
- ensure the public understands their influence,
- ensure the public understands the limitations of PE in this context, and
- explain the reasoning for decisions and how they used public input.

The following table and graphic describe:

- the decision-makers,
- decisions,
- information considered by the decision-makers, and
- the role of the public in land development application decisions.

There are three different decision-makers and four decision-making points in the process. The decision-makers are the Applicant, Planning Coordination, and City Council. Each decision-maker determines what influence the public has in their specific decision (advise, refine, create or decide (see Figure 1, The Public Engagement Spectrum)). The public isn't included in this table and graphic because they are the ones providing input into the decisions.

Decision Maker	Process Step & Decisions	Information Considered by Decision-Maker	Possible Outputs	Role for the Public in Decision-Making
Applicant	<p>Pre-Application Consultation: (1) Will I engage the public before I submit an application? If yes, to what extent and how? Am I willing to make changes to the application before and after submission based on public and/or Planning Coordination's feedback?</p> <p>Note: There are minimal specific regulatory requirements for pre-application consultation and only in the case of a Direct Control application</p>	<ul style="list-style-type: none"> Application situation/complexity Timeline and cost implications of engaging Up to the applicant how to engage and how to summarize input when submitting application Zoning Bylaw regulations apply if it is a DC2 application <p>Note: There are no City standards for how or if an applicant needs to change anything based on public input prior to submission</p>	<ul style="list-style-type: none"> If DC2: 21-day public pre-application notice required with summary of input and response to input provided with application Not a DC2: no required pre-application public consultation An applicant-led engagement process 	<ul style="list-style-type: none"> Determined by the applicant
Planning Coordination	<p>Application: (2a) Does Planning Coordination have the information needed to review the application? What's the advance notice area? What does the advance notice say? When does Administration accept the application for processing?</p> <p>Application review: (2b) Based on the review, including public input, does Administration suggest changes to the application or require additional information?</p>	<ul style="list-style-type: none"> Public input collected from applicant's pre-application engagement if required Applicable jurisdictional policies, and how they align or conflict with the application Other requirements (technical reports) Input gathered from public engagement hosted by PC. The City may plan events with stakeholders and other interested groups in order to understand and evaluate their concerns. 	<ul style="list-style-type: none"> Advance Notice Public input considered and other requirements (technical reports) are relayed to applicant Planning Coordination provides professional opinion to the applicant that may result in revisions Application may be revised by the applicant Public Engagement Event - Planning Coordination decides whether to host a public event or not Online Public Engagement - Planning Coordination decides whether to host a public webpage on Engaged Edmonton or not What Was Heard Report Application is finalized 	<p>Determined by PC:</p> <p>(2a) None</p> <p>(2b) Advise</p>
	<p>Council Report and Bylaw Preparation: (3) Will Administration recommend support or refusal of the application?</p>	<ul style="list-style-type: none"> Technical review - Planning Coordination and partner agencies City policies (sometimes conflicting) Professional planning evaluation and opinion 	<ul style="list-style-type: none"> Recommendation Public Hearing Notice Presentation prepared by Planning Coordination, including a summary of public input 	None
Council	<p>Public Hearing: (4) Does Council approve, refuse, postpone, or refer?</p>	<ul style="list-style-type: none"> Planning Coordination's presentation, recommendation and justification Public Hearing input from applicant and the public 	<ul style="list-style-type: none"> Land development application decision 	<p>Determined by Council:</p> <p>Advise (can be gathered outside public hearing as well)</p>

Table 1: Decision-Making

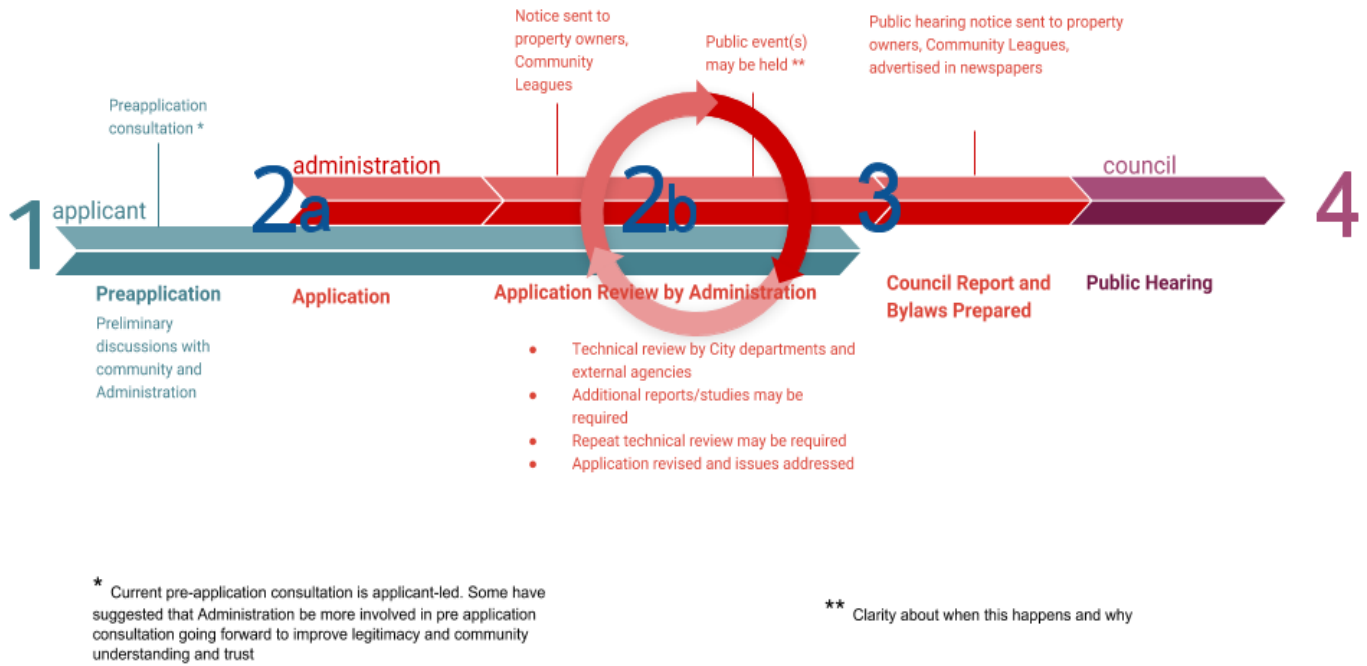


Figure 1: Decision-Making Process (above)



Figure 2: The Public Engagement Spectrum (above) explains the four roles of the public in City of Edmonton public engagement activities. As you move from left to right, there is an increasing level of public influence, and commitment from the City and the public. These roles are included in the last column of Table 1: Decision Making to show the role of the public in decision-making in the Planning Coordination process.

4. Internal Context

Planning Coordination's PE focus has been making sure affected members of the public:

- know about applications,
- have the right information, and
- are able to share their views with Planning Coordination and Council.

There are many perspectives on the current and future role of public engagement for LDAs. Land development applications vary as do roles for Planning Coordination staff managing them. Most of the public-facing functions of Planning Coordination staff is education and information sharing. They also provide Council with information for their decision-making. Another way of using public input is negotiating changes to applications. PC staff see involving the public in a positive light.

When reviewing LDAs, PC staff ensure that the application meets relevant City policies. LDAs are often "tests" of policy. PC can see if a certain policy is working by its reflection (or not) in land development proposals.

One of PC staffs' challenges is the various roles they play in the land development process. In various situations they perform different roles, including the following:

- stewards ensuring land use policies are respected,
- service providers required to process all applications,
- a neutral mediating party facilitating discussion between different interest groups,
- City of Edmonton public servants with a view of serving the public interest,
- technical experts reviewing applications and providing a specialized professional perspective, and
- community engagement experts.

This wide array of conflicting roles can leave both PC staff and others in the process uncertain.

Contributing to role confusion, Planning Coordination is a service-provider to applicants/developers. Applicants are customers and pay an application fee to the City for processing. Performance metrics are processing times and applicant and industry satisfaction. This impacts outcomes and often perceptions of their work.

Every applicant has the right to bring their LDA to a Council Public Hearing, regardless of the community's or PC staff's views. PC staff do work with applicants to get applications to where PC can recommend support. This doesn't always succeed. In any case, PC includes a recommendation of Approval or Refusal in their report to Council.

5. External Context

A main theme for the external context of this work is the different perspectives on the role and function of public engagement. The applicants' and communities' willingness and capacity to undertake or take part in engagement is also a consideration.

How PC staff talk about public engagement in this work is important. It seems well-accepted that "community" and "applicant" or "industry" are on opposite sides of the land development table. Yet each of these groups are diverse in their opinions of and participation in land development. This is not consistent, but it seems that this is how the lines are drawn on more complex files. The external context is often divided although there can be exceptions.

Applicants have a wide range of capacity, interest and commitment to engagement. This inconsistency presents a reality that is challenging for Planning Coordination. Applicants know there are benefits of community knowledge. However, it's frustrating when public input seems like other residents directing what applicants should be able to do. Applicants often see engagement as "slowing them down". This can impact their timelines, which increases costs due to delays.

Some people have motivation for participating in LDA processes and many do not. For those that do:

- maintaining the reasons why they chose their neighbourhood in the first place,
- property value, and the character and safety (as they perceive them) are all significant drivers for those that get involved. They want their perspectives mirrored in the ultimate application that goes to Council. They expect PC to amplify their concerns and also make PC's recommendation to Council based on their perspective. Many others take part in the LDA process to get information and to share perspectives about other City issues. Those that do not take part may not think that a given development will impact them, may not understand how to get involved, or may be in support of the application and don't feel like their perspective is needed or wanted.

6. Interested Parties

In any given land development application process there are a number of groups that may be interested.

Interested party	Areas of Interest
Adjacent residents	direct impacts to them (shade, parking, privacy, among other things)
General public	city-building themes (such as increased density, infrastructure capacity, walkability, affordability)
Community residents and representatives	overall character of neighbourhood
Applicant	timing, financing, impact on community
Development industry	learning how Planning Coordination and Council may make decisions in the future, benefits to their future applications
Business	whether an application supports or threatens their business interests
Special interest groups	depends on their interest
Services agencies	capacity of services provided (including water, drainage, sewer, roads)
Schools and School Boards	potential impacts to operations and safety compatibility with their site plans and school capacities
Media	newsworthiness of application, patterns of interest to the broader public
Other governments	looking for potential conflicts between different level land use plans/policy

Regardless of any application, people need to be able to learn more about development in the city.

Further, there is an appetite for education about Planning Coordination as a City service and its general processes. Action 9 of the Infill Roadmap, 2018 (Better inform residents on how they can effectively participate in the planning process), addresses this as well.

It's critical to identify the information that the public needs to take part in engagement. Some important things that the public needs to know includes:

Application Context

- Change in land use proposed - details, technical study outcomes
- Applicant's rationale for proposal
- Local land use context
- Work already completed
- Decisions that have already been made

- How application does or does not align with jurisdictional policy, regulations, guidelines
- Administration's recommendation
- Timeline including Public Hearing Date

Process

- Overall land development review process

- Decision making criteria
- Range of information to be considered
- Purpose for engagement
- When and how public input will be used
- Clarity on public, applicant and Planning Coordination's roles

Sharing this information is a basic building block in effective public engagement in Planning Coordination.

7. Considerations for Public Engagement Planning

There are a few things that should be considered in engagement planning for Planning Coordination.

a. Engagement Challenges and Opportunities

Challenges:

- Ensuring consistent, accurate, easily-understandable and accessible information about the context, application and process
- Discerning and describing the public interest, when individual perspectives are often very different
- Trust is fragile and can be easily undermined in this complicated, multi-party context
- The ability or willingness of applicants to change applications in response to community input
- Sometimes controversy at Public Hearing implies a poor engagement process, which may not be the case
- Access to Council by applicants perceived as inequitable
- Community, applicant and administrative capacity to resource engagement
- Lack of consistency in engagement planning, particularly including previous stakeholders over time (ie. when plans are amended)
- Recognizing that individual applications will not necessarily have Gender Based Analysis Plus (GBA+) applied to them, but instead they are the opportunity to apply land use and public engagement policy which has had the analysis completed
- Maintaining access to the appropriate level of engagement as gathering restrictions change
- Ensuring accessibility of online engagement tools to the public
- Including opportunities for meaningful and appropriate engagement with indigenous people in alignment with the Indigenous Framework

Opportunities:

- Gathering local knowledge and new ideas to improve outcomes
- Building ongoing relationships and trust between different groups that are interested in the community
- Getting a better, more nuanced sense of the public interest
- Informing the public about the land development process in general, the application in particular and what good urban design is
- Implementing policy and practice that has had a GBA+ lens used in its development
- Using an approach to reach a broad spectrum of people
- Broadening access to engagement by providing online opportunities.

b. Scoping Engagement

One of the challenges with public engagement work in PC is scoping engagement activities for each application. Many applications and the different contexts for each means a lot of work to figure out what should be done for PE. The list below includes five criteria that might mean that engagement planning is a priority. Scoping engagement is subjective and should include information gathering and reflection.

Time constraints

- Use engagement tools that match the time available.
- Acknowledge time constraints.
- A high priority file with time constraints may need extra resources (e.g. staff time).

Applicant considerations

- Inquire about the applicant's capacity, intention and time available to undertake engagement.
- Review the public engagement spectrum with applicants and help them select a role for the public in their decision-making process that complements what City staff determine is required as part of the City's own engagement approaches.

Significant application complexity

- Partner with applicants to approach the community early.

Heightened political sensitivity/interest

- Acknowledge sensitivity.
- Keep Ward Councillor well informed.
- Consider hiring an outside facilitator.

Community capacity challenges

- Connect early with the Community League and/or the Neighbourhood Resource Coordinator (NRC).
- Find and connect with organizations that are active in the community.
- Provide information support packages (What is Zoning?, Infill website, file website, The City Plan and any area planning policy) to Community Leagues and other groups in the neighbourhood.

c. Engagement Approaches

Currently, PC staff decide whether to use a "Basic" or "Broadened" Approach for PE. The majority of applications processed are simpler, where a Basic Approach is applied. A Broadened Approach is often considered on the fewer complex applications received. To provide extra strategic PE support, this Charter breaks down the Broadened Approach. It outlines when an Expanded Approach should be considered, tailored to unique situations.

PC staff can ask themselves these questions to help them select the best approach for each LDA:

- Does the application represent significant change to the community?
- Does Planning Coordination have significant technical or policy concerns with the application?
- Is the application perceived to affect property owners, businesses and/or other stakeholders?
- Is the application perceived to affect property of significance to indigenous people and/or groups?
- Is there a cumulative effect of this application in light of others in the area?
- Does the site have specific historical, cultural or environmental significance?
- Is there a history of public or Council interest in this specific site?
- Is the application to rezone a large site (eg. affects more than 2 hectares)?
- Is there something unique about the application that needs to be explained/addressed?
- Has the public expressed significant interest in the application?
- In the case of a road closure application, could a proposed road closure area be consolidated with many properties?

How they answer these questions will help inform whether staff should plan for more PE.

The Engagement Approach Assessment Guidelines (outlined below) provide support to PC staff. It can help them to do an early assessment and decide what public engagement approach to take. This provides a chance for PC staff to be clear and consistent about the PE approach.

d. Engagement Approach Assessment Guidelines

On occasion, as applications are processed, new information may come to light that lead staff to consider shifting to a more broadened or narrowed approach to planning for public involvement in the planning process.

Public Engagement Approach	Characteristics of the Application	Suggested Engagement Techniques
Basic Approach	<p>The most common type of application. They are straightforward and simple.</p> <p>Applications that fit this approach are often those that:</p> <ul style="list-style-type: none"> • Propose a rezoning to a standard zone of the same category in the Zoning Bylaw (e.g. IM to IB) • Follow statutory or non-statutory plans and planning policies in place • Complete anticipated development for the area • Raise little response to pre-application or advance notifications 	<ul style="list-style-type: none"> • An advance notice is sent to property owners and residents within a 60 metre radius as well as affected community leagues and business groups • Basic information on the application is added to the City of Edmonton relevant websites/pages, if appropriate.
Broadened Approach	<p>The majority of more complex applications.</p> <p>Applications that fit this approach are often those that:</p> <ul style="list-style-type: none"> • Occur in areas where previous applications have prompted extensive public response • Occur in areas where there is concern from the public regarding local drainage or transportation issues • Require amendments to statutory and/or non-statutory plans • Elicit more responses to the pre-application or advance notice with a number of questions or raised concerns 	<p>In addition to the techniques listed for the basic approach:</p> <ul style="list-style-type: none"> • An advance notice is sent to a broader catchment area (beyond that specified above) • City hosts an Engaged Edmonton website • Consider offering a meeting with Community Leagues and residents if beneficial
Expanded Approach***	<p>Applications that fit this approach are often those that:</p> <ul style="list-style-type: none"> • Involve considerations including special area zoning or site specific features • Are potentially unique proposals • Are expected to undergo multiple iterations through the application review process • Are of a scale that will significantly change the landscape • Elicit strong public opposition 	<p>In addition to the techniques listed for the broadened approach, additional public engagement efforts are planned for and may include:</p> <ul style="list-style-type: none"> • Creation of an application-specific Public Engagement and Communications Plan by the City • An in-person public engagement event, when practical • Meetings with relevant community organizations (online or in-person) • A public information session shortly before public hearing (online or in-person)

*** Engaging an outside facilitator for public event(s) and/or to assist in overall engagement efforts and reporting back may happen in some cases, if the application would benefit from an impartial facilitator.

8. Evaluation and Reporting

Planning Coordination will follow guidance from the Public Engagement Procedure to develop measures of success based on the following goals:

- Edmonton demonstrates a culture of public engagement.
- Public engagement displays mutual respect and benefit.
- Public engagement is inclusive and accessible.
- Public engagement processes are effective.
- Public engagement activities are well managed and efficient.

Broad themes of the evaluation will include:

- Overall acceptance of engagement (My voice was heard, this was a fair process)
- Awareness of the engagement objectives (I understand the information and how this impacts me)
- Inclusive and barrier free engagement process
- Participants agree they understand how the input from the engagement activity will be used
- Participants agree they had enough information to contribute to the topic
- Relationship building between city staff, individuals, and groups (Engagement displayed mutual respect and benefit)

Participant feedback forms will be available at all in-person events and be available through the Engaged Edmonton website. They will have consistent evaluation questions, and Planning Coordination and Engagement Services will report the results on a regular basis. When appropriate, the event team will also do a post-event debrief, using the City's Engagement Event Debrief Form.

9. Closing


The Charter intends to describe the early stages of planning for PE in the LDA process to ensure transparent engagement. Engagement recognizes the value and needs of all parties involved. It also requires dedication, planning, and adequate resources to be effective. Recognizing, valuing and using the knowledge held by the public, developers, and City Staff through PE will lead to:

- better understanding,
- more sharing of information, and
- increased trust among those engaged in the process.

This helps build more informed decision making for an innovative, inclusive and open City.

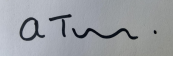
10. Agreement/Sign-off

Project Sponsor:
Travis Pawlyk, Director
Planning Coordination, City Planning
Urban Planning & Economy

Signature: 

Date: March 8, 2022

Public Engagement:
Alison Turner, Account Director
Public Engagement and Research
Communications and Engagement

Signature: 

Date: March 4, 2022